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Marketing Touchpoints — Segmenting User Groups for Greater Inclusivity

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Over the years as I've given workshops and talks about marketing, I've found there are some marketing concepts that just don't immediately resonate with my colleagues in libraries and related organizations. Rightfully, many library professionals are skeptical of applying for-profit ideas to non-profit goals that seek to advance the greater good. I applaud and encourage those folks for bringing a selective, critical perspective to borrowing from business theory and practice. I'm also of the belief that we should selectively adapt marketing methods as they make sense to benefit our users, rather than adopting marketing ideas wholesale for the sake of being more "business-like" (which isn't inherently better). However, in some cases, valuable marketing ideas get sidelined not because they're inappropriate, but because they're misunderstood. One such marketing idea in particular never fails to stimulate debate and resistance among librarians — segmentation.

Segmentation is a widely-used marketing approach that involves analyzing and breaking up the group of all potential users an organization might serve into smaller groups based on how likely those users are to respond to particular offerings. The general idea is that you can't serve everyone equally well with generic offerings, and by selectively targeting and tailoring products and services to distinct groups, you improve the chances that members of those groups will respond positively.

Intuitively, most of us recognize this principle as a fact of life in a commercial world. Our mobile devices and digital behaviors, for examples, give companies troves of information to present us with precisely personalized offers and ads based on profile data we provide, geographic location, social media likes, our purchase history, and so on. For many of us, customization — sometimes helpful, sometimes creepy, and often in-between — is a firmly entrenched expectation.

In general, this concept has great appeal to many businesses, and similarly great potential to benefit users. Businesses, for their part, can dedicate limited resources to focusing on understanding and serving the needs of customers they are best-equipped to help with products and services that provide a precise solution to customers' problems. Ideally, in doing so they maximize their resources' potential and end-user impact while avoiding the waste that results from targeting groups they can't serve sufficiently. Customers too can benefit from segmented approaches, as the target customers should receive more relevant offerings and communications that are more likely than generic ones to offer meaningful solutions, while reducing the time it takes them to cut through clutter to find suitable marketplace options.

While librarians may concede these benefits in a commercial sense, it's easy to see where the segmentation concept falls apart in an applied non-profit context. We librarians serve everyone, after all. It's anathema to preferentially select one user group over another as it's the antithesis

of our core values of inclusion, diversity, and equity. If you believe this, how could segmentation ever be applied ethically and effectively in libraries? Should it even be considered?

My answer to those questions is an emphatic, "Yes!" It's absolutely true that segmentation done poorly can alienate, exclude, and harm users. But done well, segmentation can be a go-to means of ensuring our institutions' efforts make positive differences in people's lives and actually further inclusiveness.

Accidental Segmentation Can Lead to Harm

We librarians segment all the time. While mission statements typically assert that we serve all, our practices differ by necessity. If, for example, you work in an academic library, you welcome users from all over the world, but your day-to-day work is most likely devoted to the faculty, students, and administrators affiliated with your institution. You wouldn't turn away the casual community researcher of course, and you may also create some services for these folks, but the bulk of your teaching, acquisitions, outreach, and collection management efforts almost certainly aim to advance the research and teaching activities of your college or university. Within those affiliated user bases, you also probably subdivide users by characteristics like discipline, rank, locality (on-campus vs. remote), etc.

Left unexamined, these organic segmentation activities can perpetuate inequalities and exclude underserved groups. Take for example the growing movement to apply a social justice lens to our services and acquisitions practices. As a *Library Journal* article on the topic states:

Historically, libraries have shown a low tolerance for risk and a strong tendency to allocate limited resources of time, money, and energy in areas that yield the greatest results (or, at least, the highest numbers in areas that are easy to measure) and perhaps the least potential for problems. Some libraries of all types, however, are reevaluating the role they play in their community, questioning whether it is still good enough to provide equal access, or if it is time to pursue an active equitable access that focuses on empowering the less powerful and amplifying the voices of the unheard.¹

In other words, librarians' relatively mass-market approach to serving users is being reassessed by some who find such an approach reaffirms endemic social power structures. The remedy proposed here is to selectively examine the perspectives of underprivileged groups to bring greater visibility to their voices and viewpoints via library collections and services. A segmentation approach, in this case, can be wielded to serve the underserved.

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and/or prospects and get those people to comment on the strengths and weaknesses of your company, then you've got the makings of building a strong relationship within your marketplace.

Relationships between vendors and customers are built over many years. The rock group, **Canned Heat** accomplished a gold record award for their hit "Let's Work Together" which is a fitting postscript to this article. 🐼

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Knowing Users is a Prerequisite for Helping Them

It shouldn't be surprising that in order to segment a large user base into subgroups based on users' behaviors, attitudes, and characteristics, you have to know something about those behaviors, attitudes, and characteristics. Successful segmentation is predicated on an in-depth understanding of users so that you can create truly relevant, effective services that sensitively address users' needs. You can't do that without expending some concerted effort learning about users' perspectives, and in particular how their perspectives could influence how they respond to service offerings.

An article in the *Journal of Consumer Marketing* underscores this imperative. In the article, author **Edith F. Davidson** explores the unintended consequences of race-based segmentation strategies, noting that perceived discrimination is a significant issue for minorities in business settings. **Davidson** states, "As the marketplace becomes increasingly more diverse, it becomes important for marketers to know and understand each customer group they serve. This includes knowing how groups differ in their perceptions, motivations, and interests."² Given this, segmentation is essentially an opportunity to get to know your users better.

As you start to tackle user research, where should you begin? There's more than one way to slice an onion, so to speak, and a rich array of segmentation variables to consider. Some common bases of segmentation include:

- Demographics (geographic location, age, income, ethnicity, gender identity...)
- Behaviors (frequency of visits/checkouts, in-person vs. online use...)
- Benefits sought (help with assignments, quiet/productive place to work...)
- Attitudes, interests, and opinions

As you discover groups of folks with similar characteristics that you might serve collectively, you should consider which segments make sense for your organization to target and are likely to have the greatest positive impact. The characteristics of what makes one segment better than another are well-documented in marketing literature. Though you may not have the resources to do the data crunching to parse all of these possible segments the way large businesses might, the guidelines about viable segments are nevertheless useful guideposts as you explore where to focus. Good, viable user segments tend to be³:

1. Identifiable — You can figure out who they are.
2. Substantial — Segments don't have to be small or niche. You should consider whether their size warrants the amount of effort you intend to spend tailoring offerings to them.
3. Accessible — You need to be able to communicate with members of the segment.
4. Stable — Choose user groups whose characteristics aren't prone to change rapidly over short periods of time. This will give your efforts time to gain traction.
5. Differentiable — Segment members should have needs that are different from those in other segments. If you find multiple segments with similar needs, consider combining them.
6. Actionable — Don't segment just for the sake of defining a segment. You should be able to act on the information you glean about the segment so that you can provide your services to them.

Achieve Greater Good with Smaller Focus

As you may have gleaned, the term "segmentation" is a bit of a misnomer. To segment means to divide, and it's true that segmentation requires one to examine a large user group in parts. Doing so, however, does not mean you should lose sight of the whole and sacrifice big-picture goals to satisfy a variety of subgroups.

Take for example the principle of universal design. As defined by the **Centre for Excellence in Universal Design**, it is "the design and composition of an environment so that it can be accessed, understood and used to the greatest extent possible by all people regardless of their age, size, ability or disability."⁴ For those interested in accessibility issues, we understand that by making an environment more usable for those with physical and intellectual challenges, we simultaneously make the environment more accessible for many other groups who may or may not have the same challenges. A classic example in this regard is the curb cutout. Designed so that people in wheelchairs can cross the street without being stymied by a raised curb, curb cutouts also help people pushing strollers or luggage, and generally mitigate an unnecessary barrier for all. However, creating this innovation demanded empathy and a focused understanding about the particular challenges physically disabled people encounter.

Similarly, we can view segmentation as a way to narrow our scope to elicit insights that can result in large-scale improvements. To use a library example, consider how you might target first-generation college students with services that bridge gaps in understanding academia for those whose are charting new territory within their families. You may devise specialized instruction for these students about the role of libraries and research in higher ed, which could easily translate to other groups such as international students, transfer students, and generally inexperienced academic researchers. By studying the scoped needs of first-generation students, you may uncover insights that help identify and serve a broader segment (those new to using academic libraries in the United States). Segmentation need not imply exclusiveness, but rather, an approach to greater understanding, and subsequently, inclusivity.

Concluding Thoughts

In an article about the ethics of segmentation in health-related social marketing contexts (one that shares similar ethical concerns with library contexts), authors **Newton, Turk, and Ewing** examined pertinent ethical frameworks to determining whether segmentation is ethical. Among the frameworks examined, they found a promising one for moving these ethical considerations forward called **Theory of Just Health Care (TJHC)**. Its proponent offered four conditions whereby healthcare segmentation could be applied justly⁵:

1. Segments and accompanying arguments underpinning segmentation decisions should be publicly disseminated.
2. Criteria used for segmentation should be deemed relevant by stakeholders.
3. An appeals process should be available to revise segments as needed.
4. These conditions should be regulated through voluntary agreements or legislation.

While I'm not advocating we necessarily adopt these criteria, I agree in principle that segmentation can be an exceptional opportunity to openly and critically evaluate who your services are reaching and identify sources of potential bias or oversight. The very act of articulating the needs and people your services are supposed to serve and exposing those decisions to review and feedback can help us all do better for our users.

Librarians are right to critically evaluate the intent and applicability of marketing concepts to library concerns. It is no doubt true that segmentation can be wielded for both good and ill. More questionable than applying segmentation is to continue doing so unconsciously. 🐼

Endnotes

1. <https://www.libraryjournal.com/?detailStory=why-social-justice-in-the-library-outreach-inreach>
2. **Davidson, Edith F.** "Misplaced Marketing: Unintended Consequences of Race-Based Segmentation Strategies." *Journal of Consumer Marketing* 26, no. 3 (2009): 142.
3. <https://hbr.org/2014/07/what-you-need-to-know-about-segmentation>
4. <http://universaldesign.ie/What-is-Universal-Design/>
5. **Newton, Joshua D., Newton, Fiona J., Turk, Tahir and Ewing, Michael T.** "Ethical Evaluation of Audience Segmentation in Social Marketing." *European Journal of Marketing* 47, no. 9 (2013): 1427.